Preliminary Field Inspection Team Meeting Check Sheet

Purpose

The Preliminary Field Inspection (PFI) team meeting is an inter-disciplinary team milestone to allow managers/ designers of different disciplines to review a preliminary set of roadway plans. PFI serves as a review of the "alignment and grade" and a check of project progress. This process serves as a status check of stakeholders for the project manager and a milestone for all disciplines to gauge their own task status in relation to the project. Additionally, this serves as a "kick-off" task point for major work to begin in S&B, TED/ITS, RW/Utilities, ENV, and Materials.

Project Team Attendees

✔	Project Team Attendee	✔	Project Team Attendee
	Project Manager		District Construction Engineer
	Location & Design		District Engineer for Asset Management
	Environmental		Resident Engineer
	Structure & Bridge		Programming
	Mobility Management		Scheduling & Contract
	Right of Way & Utilities		Local Financial Assistance
	Materials		FHWA
	Transportation & Mobility Planning		Locality
	Public Affairs		Utility Owners
	Project Consultants		District Traffic Engineer
	VDRPT		

Project Manager Responsibilities

- Provide leadership and management necessary to ensure completion of scheduled tasks required for PFI.
- Distribute PFI plans to appropriate team members.
- Plan, lead and facilitate PFI team meeting.
- Prepare and distribute PFI report to include:
    - PFI meeting minutes
    - Value Engineering key points
    - Evaluation of scope, schedule and budget.
- Request design and additional data to include:
    - Traffic Data
    - Soil Survey
    - Construction Estimates
    - Preliminary R/W Estimate
    - Utility Designation
    - Landscape Design
    - Bridge Design
- Provide documents for V.E.

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Project Deliverables and Responsibility Matrix

● Responsible ✔ Participates ☐ Notified

✔	Deliverable	L&D	ENV	MAT	S&B	MM & TE	RW/ UTL	S&C	RE	ASSET MGT
	Route Survey	●	☐	☐	☐		☐			
	Initial Roadway Design	●	✔	✔	✔	✔	✔	✔	✔	✔
	Initial Hydraulic Analysis	●	✔	✔						
	Initial E&S Calculations	●	✔	✔						
	Wetland Screening	☐	●				☐			
	Hazardous Material Screening	☐	●				☐			
	Preliminary Soil Report	☐	☐	●						

Meeting Activities

✔	Activity	Activity Lead
	Review project Scope, Schedule, and Budget	Project Manager
	Review PFI plans	Location & Design
	Identification of items that affect right of way/utilities, permits, cultural resources, hazardous materials, and other environmental issues.	Project Manager
	Discuss/review VE Report	Value Engineering
	Discuss/address environmental issues	Environmental
	Discuss/address constructability issues	Schedule & Contract
	Discuss/address maintenance issues	Asset Management
	Review Preliminary Soils Report	Materials
	Discuss/review locality issues	Resident Engineer/ Local Assistance
	Discuss and evaluate all identified project threats and opportunities	Project Manager
	Discuss/review other stakeholder issues	Project Manager
	Discuss/review communications issues internal and external	Public Affairs

Meeting Outputs

- PFI Report to include:
  - Team meeting minutes and documented team response to VE Report.
  - Evaluation of project scope, schedule and budget with documentation of any revisions.
  - Team review and agreement on project alignment and grade.
  - Identification of items affecting cut/fill limits and earthwork, RW/Utilities, permits, cultural resources, hazardous materials, and other environmental issues.
  - Current project threat and opportunity evaluation.
  - Documentation of lessons learned to this point of project development.
- Plan and schedule for completion of deliverables necessary for next project milestone.
- Final Community Outreach / Communications Plan.
- Soil/Foundation Investigation sites for PH.

Project Team Responsibilities

L&D	• **Survey**
	  • Electronic data files of the route survey
	  ▪ Master survey file
	  ▪ Utility file
	  ▪ Digital terrain database and file
	  ▪ Bridge situation survey file
	• **Initial Roadway Design**
	  • Horizontal alignment with lane assignment and design data (curves, design speeds, etc.)
	  • Vertical alignment and design data (curves, etc.)
	  • Typical sections
	  • Limits of disturbance
	  • Existing features and base mapping with property mosaic, traverse survey, property lines (metes and bounds) survey, and appropriate topography.
	  • Proposed areas of planned development as provided by residency.
	  • Existing utilities with known areas of conflict identified
	  • Cross sections of critical areas
	  • Retaining wall locations
	• **Hydraulic Design**
	  • Hydrology and hydraulics (H/H) identification of storm water management area sizes and bridge opening requirements. H/H issues involving large amounts of property should be defined, and H/H should be sufficient to allow S&B to begin type, size and location. Prepare preliminary Storm Water Management Report.
	  • Identification of preliminary soil boring sites for PFI plans.
	• **Erosion & Sediment Calculations**
	  • Prepare computations for Erosion and Sediment Control Report.

ENV	• **Preliminary Sound Barrier Design**
	  • Perform Air Noise analysis / draft report
	  • Preliminary noise wall height, length, location (if available)
	• **Environmental Permit Determination**
	  • No completed products at this time. Initiation of permit determination process to include determination of staff, estimate, and resources.
	  • Begin threatened/endangered species identification.
	• **Streams/Wetland Screening**
	  • No completed products at this time. Initiation of streams/wetland screening process to include determination of staff, estimate, and resources. Preliminary identification of wetland/stream impacts.
	  • Assess physical alteration to wetlands/waters and delineate locations.
	  • Begin evaluation of compensatory mitigation alternatives.
	• **Hazardous Material Screening**
	  • No completed products at this time. Initiation of hazardous materials screening process to include determination of staff, estimate, and resources. Preliminary identification of hazardous materials issues.
	  • Begin documentation.

Project Team Responsibilities (cont'd.)

MAT	• **Preliminary Soils Report**
	  • Develop preliminary soils report, identifying preliminary slope needs and pavement section.
	• **Soils Investigation (historical data)**
	  • Initiate soils investigation to support PH plans and subsequent soil report
	• **Foundation Investigation (historical data)**
	  • Initiate foundation investigation to support PH plans and subsequent major/minor foundation analysis and report.

S&B	• **PFI Preparation** No completed products at this time. Preparation should include identification of any issues pertaining to bridge location, aesthetics, sidewalks, lighting, constructability, maintainability, site and environmental constraints.
MM & TE	• **PFI Preparation** No completed products at this time. Preparation should include identification of any issues that may affect traffic engineering or intelligent transportation system design.
RW/ UTL	• **PFI Preparation** No completed products at this time. Preparation should include review of plans and recommendations of design changes to minimize RW/Utility impacts. Utility preparation should include drafting/discussing existing and proposed utilities.
S&C	• Review project plans for possible construction issues (MOT, safety, constructability).
PUBLIC AFFAIRS	• Identify and flag emerging problems/issues that could have political and public positive or negative consequences and work with other stakeholders to diffuse as necessary

Project Team Responsibilities (cont'd.)

STAKEHOLDERS

Input should be provided by all other project stakeholders. For example, but not limited to:

Value Engineering Team

- Conduct the 3 to 5 day VE study dependent on VE leaders assessment of the project.
- Prepare "draft" VE report and submit to project manager prior to PFI.

Programming Division

- Ensure project schedule is consistent with programmatic assumptions and necessary funding is secured.

Asset Management

- Review project plans for possible maintenance issues (recurring drainage problems, maintainable slopes, recurring maintenance obstacles, etc.).

Transportation & Mobility Planning

- Provide Traffic Forecast.
- Provide data/information on project from programming phase, such as MPO and issues relative to non-attainment areas.

Resident Engineer/Local Assistance

- Provide input regarding regional, municipal and other local issues.
- Develop and provide interface and coordination with local jurisdictions for project team (some local groups may not be identified as project team members but their input should be coordinated through the Resident Engineer).

Special Interest Groups

- Some projects may have the need for special interest group involvement at the discretion of the Project Manager, these groups should come to meeting prepared to present their needs relative to the project.

Utility Owners

- Some projects may warrant the involvement of a utility owner depending on the total utility impact on scope, schedule and cost. Involvement is at the discretion of the Project Manager in conjunction with input from RW/Utilities Division.

VDRPT

- VDRPT representative will ensure the wishes of the railroads impacted by the project are communicated with the project team.